

Embedded indexing

Pros and cons for the indexer

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Indexers who write indexes for computer-related documentation may be asked to create embedded indexes in desktop publishing programs like Microsoft Word and FrameMaker. This article discusses some of the advantages and disadvantages of creating embedded indexes.

Index entries that are inserted electronically into the computer files along with the text of the document are known as 'embedded'. Instead of creating a separate index file with dedicated indexing software, an embedded index is created in the same software as the rest of the document (e.g. Microsoft Word or FrameMaker). Although embedded indexes have several advantages for the client, there are several disadvantages for the indexer who creates them.

When clients ask for an estimate for an index that will be embedded in electronic text files, they are often dismayed at the time that it will take for such an index to be created. I often find myself explaining to the client *why* it takes longer to create an embedded index. This article discusses some of the advantages and disadvantages of embedded indexing, why clients want them and why they are more of a challenge to create.

Advantages

Embedded indexing is usually desirable for computer-related manuals or other technical documentation that is likely to be updated frequently. When the manual is updated, the index can be re-generated quickly and the page references will be accurate. Another advantage is that if the document goes online, it is fairly easy to make index references into links so that the user can click on the index entry and the relevant text is displayed. Companies publishing 'high-tech' books usually prefer embedded indexes; traditional publishers rarely request them. Some other advantages of embedded indexing are:

- Indexing can begin before page numbers are finalized. If text is added or deleted, the locators will still be accurate.
- Future revisions of the text will not require re-indexing of the entire text since index entries will be retained in the text that remains unchanged.
- Material that will be published in both a printed and electronic format will benefit from embedded indexing.
- Embedded indexing is convenient for custom publishing (on-demand publishing); if a university press wants to create a textbook that just includes chapters 1, 3, 5, 7 and 9, the corresponding index can be generated quickly.

- Embedded indexing is convenient for the author during editing of a book-length manuscript to find material quickly.

Disadvantages

Publishing programs like Microsoft Word and FrameMaker were not designed to be tools for indexing. When I was a technical writer at a large international corporation, we used FrameMaker to produce very large technical manuals. FrameMaker is well suited to this task because it was designed for that purpose. Companies producing these desktop publishing programs have added other 'bells and whistles' to their programs but there have not been many improvements to the indexing feature in recent upgrades (Mulvany, 1999).

The major disadvantages of creating embedded indexes over stand-alone indexes are:

- The indexer cannot work on one set of text files while the author edits another set of files. Only one person can make changes to an electronic file at a time.
- It takes much longer to write embedded indexes than stand-alone indexes. Mulvany (1994: 259) estimates that creating indexes with DTP programs takes two to three times longer than creating indexes with dedicated indexing software tools, and my experience supports that estimate.
- Embedded entries will be deleted when text is deleted. Because the index entries are right in the text file, they will be deleted when the writer deletes the corresponding paragraph. When a document is extensively revised, how much of the original indexing work will remain? Do the remaining entries still make sense, or has the basic organization of the index been undermined?
- The indexer must carefully check every cross-reference manually (dedicated indexing software does this for you).
- Leading prepositions, articles and conjunctions in sub-entries are not ignored, as they should be. This is a feature of most dedicated indexing programs.
- The indexer has little, if any, control over sorting.

Embedded indexing takes more time and careful checking than creating an index with dedicated indexing software.

Indexing with programs like Word or FrameMaker is like indexing with your eyes closed; you cannot see how the index will look until you generate it. For example, in Word, to create the following index entries:

```
software
  copying, 38
  installing, 59
  searching, 71
  troubleshooting, 74
```

the indexer types index entries in the appropriate places in the body of the Word file that look like this:

```
{xe "software:copying"}{xe "software:installing"}
{xe "software:searching"}{xe "software:troubleshooting"}
```

The index entries are actually hidden text in the file, so they are not visible on the screen unless you choose to display the paragraph markers and hidden text.

To create the same index entries in FrameMaker, the indexer would type the following text in the Index Marker box in the appropriate places in the body of the FrameMaker file:

```
software:copying;software:installing;
software:searching;software:troubleshooting
```

But creating the index entries is not as bad as editing the entries after you have compiled the index. The indexer must return to each index entry in the text, edit the entry, and then re-compile the index to be sure that the index now appears as intended. (I should add that this is a little easier in FrameMaker than in Microsoft Word, because the indexer can click on links in the index that open the corresponding index marker in the document.) This process of editing entries and re-compiling the index is repeated many times until the index is finished and polished.

Good news!

Fortunately, there are some products that make it easier to create and edit embedded indexes. When I write an index in Microsoft Word, I use the latest version of CINDEXTM (V. 1.5), which allows me to drag and drop index entries from the CINDEXTM window into the Word document in another window. This allows me to use CINDEXTM to write the index, sort it in page number order, and then drag and drop the entries into the Word file. This saves time because it is so much faster to edit the file in dedicated indexing software than in Word. There are a couple of other companies who are currently working on programs that will work in a similar way.

For FrameMaker, IXgen is available from Frank Stearns Associates, Inc. (see www.pacifier.com/~franks/ixmid.html for more information). IXgen allows you to do the following:

- Gather some or all of your marker text in an alphabetized list, edit that list (using find/change, spell checker, and so on), then update the source markers.
- Edit marker text while embedded in body text.
- Collect text from selected paragraph tags (such as heads and subheads) or character tags (such as emphasis) and place that text in new markers.

- Shuffle existing marker text to create new markers.
- Search a document on a list of keywords and insert markers where those keywords were found. A keyword list, once made, could be used over and over again for new documents in similar topic areas.
- Base a keyword list on an existing index.
- Build hypertext links based on a keyword list.

For now, all the advantages of embedded indexing seem to lie with the client or manager who publishes the documents with embedded index entries in them. Indexers had to wait many years for computers and dedicated indexing software to make their jobs easier. Hopefully, we won't have to wait so long for embedded indexing tools to be improved so that they meet the needs of their users.

References

- CINDEXTM indexing software, Indexing Research, 100 Allens Creek Road, PO Box 18609, Rochester, NY 14618, USA. Tel: +1-(716)-461-5530. Email: info@indexres.com Website: www.indexres.com
- IXgen, by Frank Stearns Associates. Website: www.pacifier.com/~franks/ixmid.html
- Mulvany, Nancy C. (1994) *Indexing books*. Chicago, IL: University of Chicago Press.
- Mulvany, Nancy C. (1999) Software tools for indexing: revisited. *The Indexer* 21(4), 160-3.

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So that's why we need indexes!

Information has never arrived in convenient chunks, let alone with all its implications spelled out and its contents clearly labelled; so the lorries full of facts driving around our minds have seldom been properly unloaded; only if they break up their cargoes into little packets can they deliver them to a destination where attention will be paid to them.

(From T. Zeldin, *An intimate history of humanity* (London: Sinclair-Stevenson, 1994), p. 252, quoted in Michael Hill, *The impact of information on society* (East Grinstead: Bowker-Saur, 1999), p. 72)
